

## Attachment B -- IPOC Monthly Report

This form constitutes a template for the formal reporting of IT project oversight findings, and is to be completed by the independent oversight teams that perform independent oversight as described in the Department of Finance IT Project Oversight Framework. The design of this report is intended to meet the need for concise, *risk oriented* reporting to top management.

### Project Information

Current Date:	Project Criticality: (L,M,H)
Project #:	Project Approval Date:
Department:	Last Approved FSR/SPR:
Agency:	Project Mgr Phone:
Project Mgr:	Project Mgr Email:

Independent Oversight Team Leader:
Organization:
Phone #:

#### 1.1.1.1 SUMMARY OF CURRENT STATUS

##### **Current Phase Information**

Current Phase:	Planned Phase Start Date:
Actual Phase Start Date:	Planned Phase Completion Date:

##### **Deadlines (Schedule and Delivery Dates)**

Check the statement that most closely applies.

<input type="checkbox"/>	Ahead-of-schedule: One or more major tasks or milestones have been completed and approved early. All other major tasks and milestones completed and approved according to plan.
<input type="checkbox"/>	On-schedule: All major tasks and milestones have been completed and approved according to plan.
<input type="checkbox"/>	Behind-schedule: Delivery or approval of one or more major tasks or milestones is overdue or known to be behind schedule.

#### Resources (Level of Effort)

Check the statement that most closely applies.

	Completion of one or more major tasks and/or acceptable products has required or is expected to require materially (>5%) fewer hours than planned.
	All major tasks have been completed and acceptable products created using the planned number of hours (within 5%).
	Completion of major tasks and/or acceptable products has required or is expected to require materially (>5%) more hours than planned.

#### Resources (Budget/Cost)

Check the statement that most closely applies.

	The project is materially (>10%) under budget.
	The project is operating within budget.
	Material budget increases (>10%) are likely.

#### Quality (Client Functionality)

Check the statement that most closely applies.

	Required client functionality is adequately defined, given the current project phase, and is being successfully built into the system.
	Required client functionality is adequately defined, given the current project phase, but is not being successfully built into the system.
	One or more significant components of required client functionality are inadequately defined, given the current project phase.

#### Quality (System Performance)

Check the statement that most closely applies.

	The system technical architecture is adequately defined, and modeling, benchmarking and testing are being conducted (or are planned) appropriate to the current project phase and complexity of the architecture.
	The system technical architecture is adequately defined, given the current project phase, but inadequate modeling, benchmarking and testing are being conducted (or are planned) OR the results of modeling, benchmarking and testing indicate material performance deficiencies in the architecture.
	The system technical architecture is inadequately defined, given the current project phase.

## Independent Oversight Team Risk Assessment

List the greatest threats to completing the project on the current approved schedule.

List no more than three.

- 1.
- 2.
- 3.

List the greatest threats to completing the project within the current approved budget

List no more than three.

- 1.
- 2.
- 3.

List the greatest threats to delivering a system that contains all client specified functional requirements

List no more than three.

- 1.
- 2.
- 3.

List the greatest threats to delivering a system that meets all technical performance requirements

List no more than three.

- 1.
- 2.
- 3.

Provide a brief narrative analysis (probability, impact, time frame) for the top risks listed above. Rank the top five risks using the independent oversight team's best professional judgment.

1.

2.

3.

4.

5.

## Current Review Findings and Recommendations

Present the findings and recommendations arising from the independent review of project documentation, interviews, demonstration of project activities and deliverables, and the completion of the assessment questionnaire applicable to this project. Emphasis should be placed on material deficiencies and outstanding examples of the implementation of best practices.

### Planning and Tracking

Finding:

Recommendation:

### Procurement

Finding:

Recommendation:

### Risk Management

Finding:

Recommendation:

### Communication

Finding:

Recommendation:

### System Engineering

Finding:

Recommendation:

## Progress Toward Addressing Prior Recommendations

Present the current status of the project's efforts to address prior recommendations.

### Planning and Tracking

Recommendation:

Status:

### Procurement

Recommendation:

Status:

### Risk Management

Recommendation:

Status:

### Communication

Recommendation:

Status:

### System Engineering

Recommendation:

Status:

### Attachment:

Completed Assessment Questionnaire

Pertinent Risk Management Forms

Other pertinent project oversight documentation substantiating findings and recommendations